

# SCANNER

WINTER EDITION

2020

## Reaching New Heights

Hoag Promise Campaign Still Going Strong After Hitting \$627M Goal 18 Months Early



### Campaign Milestones



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## LETTER FROM THE CHAIR

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Dear Friends of Hoag,

It is my honor to begin my service as Chair of the Hoag Hospital Foundation Board at a very exciting time. Although we've surpassed the overall Hoag Promise Campaign goal of \$627 million eighteen months ahead of schedule, we are not slowing down. In 2020, we are tasked with meeting the remaining goals for each of Hoag's clinical areas. I know we will complete this final year of the Campaign with all of the passion and commitment we demonstrated at the public launch in 2015. I'm very excited to take on the work ahead of us.

I want to express my gratitude and respect for outgoing Hoag Hospital Foundation Board Chair Robert Brunswick. Under his watch, Hoag has broken its previous fundraising records. Robert, with his wife, Kitty, established the Hoag Innovators, a group which supports Hoag physician leaders in bringing the latest new advances to our community. Robert's boundless energy, enthusiasm and creativity have left an indelible impression on all of us who have had the privilege to serve with him. Thank you, Robert, for all you have accomplished.

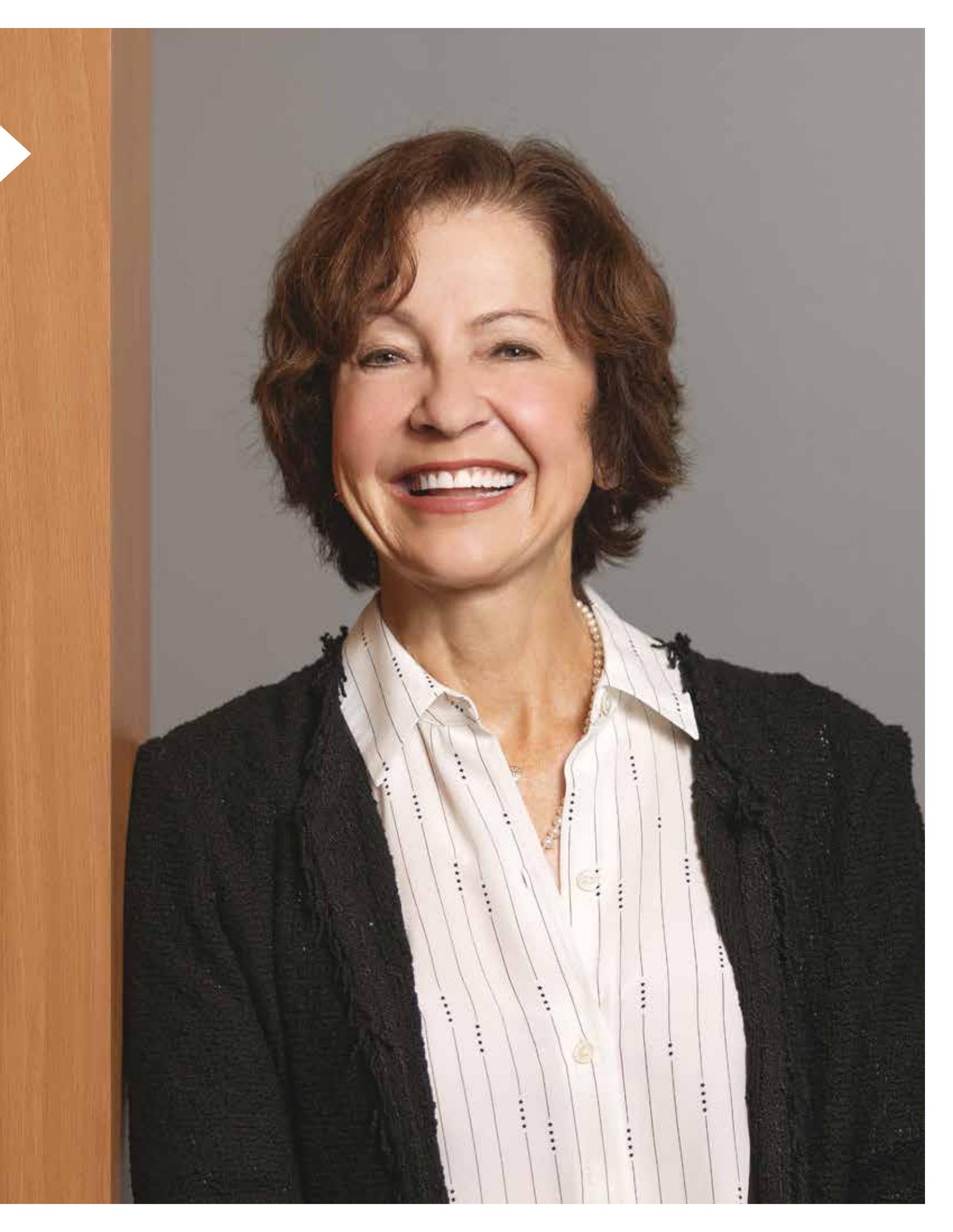
Our community has always played an active role in shaping what Hoag has become from its inception. Thanks to your support, Hoag has boldly introduced leading-edge technologies—many times being the first or only organization in the region to offer such advances. It has pioneered innovative programs and approaches to care and recruited top-notch clinical and administrative leadership. For our past and future successes, and for positioning Hoag at the forefront of advanced care, I am thankful to you, Hoag's dedicated donor community.

I am privileged and fortunate to serve on the Hoag Hospital Foundation Board with a group of extraordinarily committed volunteer leaders. Looking forward as we embark on the final year of the Hoag Promise Campaign, we are preparing Hoag for its next evolution. If the past has shown us anything, it is that we are ready to do great things together.

Warmly,



Kathleen M. Armstrong  
Chair, Hoag Hospital Foundation Board of Directors



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# Reaching New Heights

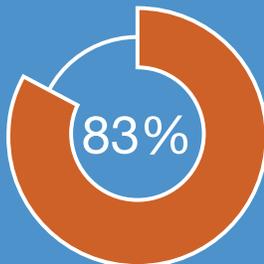
Hoag Promise Campaign Still Going Strong After Hitting \$627M Goal 18 Months Early

In 2019, we announced that the Hoag Promise Campaign surpassed the \$627 million goal 18 months ahead of its December 31, 2020, target. While an auspicious milestone, hitting the goal is by no means the end of the Hoag Promise Campaign, which is continuing until its end date.

## There's More to Do

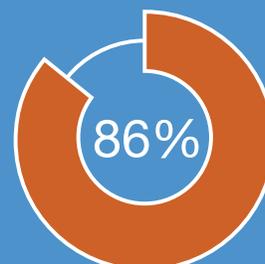
Although the Campaign has hit its overall goal, we still have several ambitious clinical fundraising goals within the larger Campaign, such as:

### Hoag Family Cancer Institute



of \$100 Million

### Jeffrey M. Carlton Heart & Vascular Institute



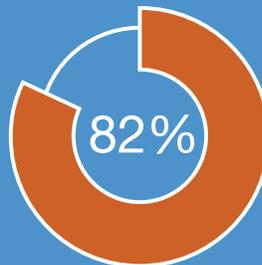
of \$90 Million

### Pickup Family Neurosciences Institute



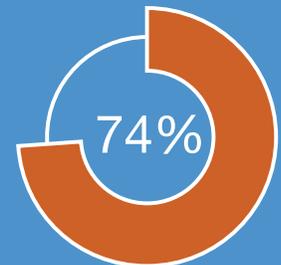
of \$80 Million

### Women's Health Institute



of \$60 Million

### Hoag Orthopedics



of \$15 Million

# COVER STORY

## Your Impact

Here are just a few highlights of what you've helped Hoag accomplish since the 2010 start of the Hoag Promise Campaign

**\$644 MILLION** Total raised to date

**22K** Total donors

**84,600** Gifts given to date

**2,550+** Scholarships awarded to Hoag nurses and staff

**100+** Positions funded by philanthropy at Hoag

**17** Endowed Chairs have helped physician leaders advance their specialties

**1** MR/PET scanner only hospital on West Coast

**#1** rated hospital in Orange County

**#4** rated hospital in the Los Angeles Metro Area

**21** Phase 1 Clinical Trials bringing the latest cancer care to our community

**4th** highest volume provider nationally of both total robotic-assisted surgeries and gynecologic robotic-assisted surgeries

**#8** rated hospital in California - 2017-2018 U.S. News & World Report

**1st to employ robotic-assisted surgery** in Southern California

**1st in Orange County and 2nd in California** to be certified as a Comprehensive Stroke Center

**1st Valve Center** on the West Coast

**1st and only in Orange County** to be designated as a Certified Quality Breast Center of Excellence™

**1st of its kind in Orange County** Fudge Family Acute Rehabilitation Center

Thank you for all you've done, and continue to do, to make this remarkable accomplishment possible!

## HOAG MILESTONE



# A Decade of Dedication

Celebrating the 10-Year Anniversary of the Mary & Dick Allen Diabetes Center

On October 10, the Mary & Dick Allen Diabetes Center celebrated its ten-year anniversary with leading philanthropists and volunteer leaders, clinical leaders and support teams, friends and staff.

“Our success depended on you,” said namesake donor Dick Allen. “And you came through big time. There are over 2,300 people who have donated to this diabetes center and collectively have given over \$26 million.”

Mary and Dick Allen partnered with Hoag to found the Allen Diabetes Center after their granddaughter, Hannah, was diagnosed with type 1. They made the first \$1 million leadership gift that established the endowment which enables the Allen Diabetes Center to provide comprehensive services for both adults and children with, or at risk for, diabetes.

Kris Iyer, MD, senior vice president and chief administrative officer of HMTS, shared that one of the important milestones in the Allen Diabetes Center’s ten-year journey was the development of the Herbert Family Program for Young Adults with Type 1 Diabetes, which focuses on psycho-social issues.

“Lauri Delson was way ahead of her time,” he said. “She was insistent and gave philanthropic support and volunteer leadership to establish the Herbert Program that helps young people with the emotional transitioning from pediatric to adult diabetes management.”

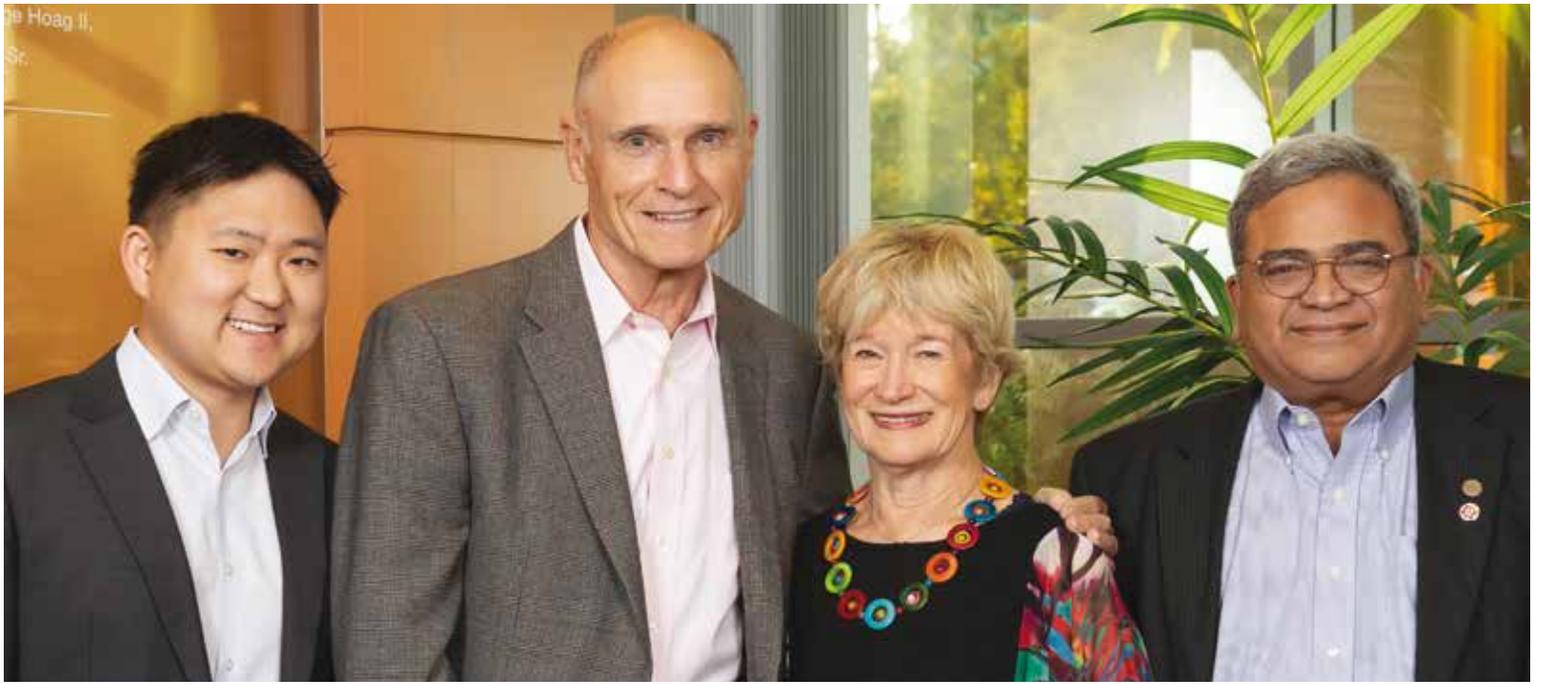
No one understands the importance of psycho-social support more than grateful patient Lindsay Lawrence, who touched everyone with her passionate, heartfelt story. The Allen Diabetes Center provided her with the support and care she needed to fulfill her dream of having a family.

“I didn’t know deep down inside if having children could be a reality for me,” she said. “But because of programs like Sweet Success, I have two healthy babies, Addison and Grayson. Living with diabetes is a marathon and, as long as we have the Allen Diabetes Center who takes care of the whole person, we get through to the next day and the next.”

Grateful for the groundwork laid by philanthropy, Allen Center Program Director David T. Ahn, MD, Dr. Kris V. Iyer Endowed Chair in Diabetes Care, looked forward to the future.

“Our goal is to better reach at-risk patient communities such as those dealing with depression, eating disorders and memory loss. We also want to expand our footprint in our community by strengthening our partnerships through wellness groups and events,” he said. “All of this while remaining on the leading edge of clinical care by offering advanced treatments, technologies and clinical research.”

For more information about supporting the Mary & Dick Allen Diabetes Center, please contact Nicole Burelli at (949) 764-6780 or [Nicole.Burelli@hoag.org](mailto:Nicole.Burelli@hoag.org).





If you would like information on how you can support innovations in cancer treatment at Hoag, please contact Gwen Ritter at (949) 764-7209 or [Gwen.Ritter@hoag.org](mailto:Gwen.Ritter@hoag.org).

## DONOR TRIBUTE

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# A Story of Innovation

### Dean and Gerda Koontz Give \$9M to Hoag to Transform Radiation Oncology Care

Hoag grateful patient and author Dean Koontz and his wife, Gerda, longtime donors, have graciously committed \$9 million to transform cancer care in Orange County. In recognition, Hoag named the Dean & Gerda Koontz Radiation Oncology Center in their honor.

Through the couple's generosity, Hoag will be the only hospital in Orange County, and one of only two in California, to introduce the ViewRay MRIdian®, the world's first MRI-guided radiation therapy system. The MRIdian® uses next generation technology to combine a diagnostic quality MRI scanner with a radiation linear accelerator. This allows for streaming real time imaging of the radiation target and surrounding critical structures while a patient is being treated, a capability which has not been available before now.

#### Groundbreaking Technology

This tremendous support of Hoag Family Cancer Institute will provide cancer patients with groundbreaking technology that will improve outcomes, allow doctors to target difficult-to-treat cancers and decrease the side effects associated with radiation cancer treatments.

"This technology ushers in a new era of cancer treatment, helping us to realize the promise of targeted medicine in a way that is safer and more effective for our patients," said Burton L. Eisenberg, MD, Grace E. Hoag Executive Medical Director Endowed Chair of Hoag Family Cancer Institute. "The benefit this enhanced system will provide cancer patients in our community cannot be overstated, and we are deeply grateful to the Koontz family for this gift."

MRI-guided radiation therapy can be used to treat many cancer types, especially tumors which are mobile or are adjacent to critical structures which are mobile. Pancreatic cancer, for example, is an organ

that moves and can be seen much more clearly using MRI-guided imaging.

"We all know that our bodies are constantly in motion. Our lungs move as we breathe, our bowels move as we digest, our bladders fill and empty and any tumor or adjacent organ will shift accordingly," states Craig Cox, MD, Medical Director of Hoag Radiation Oncology. "One of the fundamental challenges in radiation oncology is how to hit a moving target. With real time MRI-guided therapy, we now can treat with exact precision. We can see the target, we can see the normal tissue we want to avoid and react appropriately."

#### Cancer Treatment Game Changer

The unique capabilities of the ViewRay MRIdian® cancer treatment system allow radiation oncologists to modify their treatment plan while the patient is being treated to account for variations in the location, shape and size of the tumor. Doctors will be able to change the shape of the radiation dose within the body and control the delivery of the beams depending on how a tumor is tracking.

"This technology makes radiation therapy more precise—we can change our radiation plan on the fly and react to the conditions of the day or even the fraction of a minute," says Peter Chen, MD, Hoag radiation oncologist. "There are also intriguing possibilities for the future. Research is underway to look at how the MRI profile of a tumor changes as a patient's treatment progresses."

"The fact that this technology will result in better outcomes and improved quality of life makes it a game-changer," Dr. Cox said. "We are excited to be able to offer it as part of our comprehensive cancer care and we are very grateful to the Koontz family for making it possible."

## ENDOWED CHAIRS

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# Celebrating Clinical Excellence

### Three Hoag Physicians Honored in Endowed Chair Investiture Ceremony

Hoag Hospital Foundation held an Endowed Chair Investiture ceremony in August 2019 honoring three Hoag physician leaders and visionary donor families Tom and Marianne Larkin and Eric and Sheila Samson. Their gifts will support Hoag in maximizing opportunities and meeting the challenges to innovate and develop advances in care.

Through our generous donor community, Hoag's Endowed Chair Program continues to flourish. "The benefits of endowed chairs are exponential," said Robert Braithwaite, Hoag president and CEO. "They enhance the reputation of the organization, which attracts and retains renowned clinicians and staff who provide exceptional care to our community."

Flynn A. Andrizzi, PhD, president of Hoag Hospital Foundation, added, "Endowed chairs provide resources for chair holders to advance their areas of specialty. By funding our three newest endowed chairs, the donors we are honoring also provided important support to the Hoag Promise Campaign. We are grateful for their vision and generosity."

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*"Endowed chairs enhance the reputation of the organization, which attracts and retains renowned clinicians and staff who provide exceptional care to our community."*

**~Robert Braithwaite**  
Hoag president and CEO

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## The Larkin Family

Before they passed away, Tom and Margaret Larkin were longtime Hoag donors and friends. Their support covered a wide range of areas, including the Hoag Family Cancer Institute, Pickup Family Neurosciences Institute and Mary & Dick Allen Diabetes Center. One of their last gifts was to establish an Endowed Chair at Hoag:

### **Daniel Von Hoff, MD, FACP, FASCO, FAACR, Margaret Givan Larkin Endowed Chair in Developmental Cancer Therapeutics**

Daniel Von Hoff, MD, Margaret Givan Larkin Endowed Chair in Developmental Cancer Therapeutics, brings a national reputation and extensive expertise in oncology drug development and research to Hoag Family Cancer Institute's Developmental Therapeutics Program. During his 40-year career, he has implemented phase I trials

for more than 350 new anticancer agents and was involved in the development of many of the drugs which are routinely used today.

Margaret and Tom Larkin's son, Tom III, shared that Dr. Von Hoff's appointment honored his mother's memory. "My parents were larger-than-life people who cared deeply about their community and others less fortunate," he said. "My mom would've absolutely loved to have seen the tremendous growth of Hoag's clinical research trials."

For Dr. Von Hoff, his mission remains simple: to use his vast experience and ability to help people. "I would like to thank the entire Larkin family for this wonderful opportunity," he said. "I'm going to make you proud."



## The Samson Family

Natives of South Africa, Eric and Sheila Samson are generous philanthropists who give worldwide, primarily to support health care and education. The Cleveland Clinic is among the recipients of their generosity. Now, much to the great fortune of our community, the Samsons have established two Endowed Chairs at Hoag:

### **Dipti Itchhaporia, MD, FACC, FESC, Eric & Sheila Samson Endowed Chair in Cardiovascular Health**

Dipti Itchhaporia, MD, Eric & Sheila Samson Endowed Chair in Cardiovascular Health, is the program director of Disease Management for the Jeffrey M. Carlton Heart and Vascular Institute. She leads Hoag's Congestive Heart Failure Management Program and the Anticoagulation Clinic.

Through her dedication, Hoag received the Get With The Guidelines®–Heart Failure Gold Quality Achievement Award from the American Heart Association. For eight years, Hoag Heart Failure Program has been recognized by the American Heart Association and in 2018 was awarded the Gold Quality Achievement Award.

Dr. Itchhaporia praised her dear friends Sheila and Eric Samson for this extraordinary gift. “Generosity is part of their life, and their legacy is excellence,” she says.

“The Jeffrey M. Carlton Heart & Vascular Institute was born out of philanthropy, and the Eric & Sheila Samson Endowed Chair in Cardiovascular Health will add to that legacy and enhance the care of our patients.”

### **Abhay S. Parikh, MD, Eric & Sheila Samson Endowed Chair in Gastrointestinal Health**

Twenty-two years ago, Abhay S. Parikh, MD, Eric & Sheila Samson Endowed Chair in Gastrointestinal Health, and his wife, Dr. Itchhaporia, were visiting Newport Beach. He pointed to Hoag Hospital Newport Beach sitting on the hill. They decided right then and there that if they had the opportunity to work at Hoag, they would seize it. Today, Dr. Parikh serves as Program Advisor to Hoag Digestive Health.

Dr. Parikh described the varied and complex field of gastrointestinal health as a blend of many specialties, both in-patient and out-patient. “My work allows me to establish a good rapport and continuity of care with my patients, which I like,” he says with a warm smile. “I’m very grateful and happy that Eric and Sheila have chosen me to further gastrointestinal health care in our community.”

Dr. Parikh has served on several Hoag committees, including the Medical Executive Committee and chair for the Division of Gastroenterology.

## DONOR TRIBUTE

# Heavy Hitter

Longtime Hoag Donor Gary Fudge Helps Bring Maternity Services to Irvine with \$4M Gift



In September 2019, Hoag began construction of the Fudge Family Birthing Suites at Hoag Hospital Irvine with the help of namesake donor Gary Fudge (shown above at the construction kickoff). A longtime Hoag supporter, Gary committed \$4 million to the new facility which will expand maternity services to Irvine.

“I’m pleased to support Hoag in providing moms and families in Irvine with easier access to the ‘Hoag difference’ in a beautiful birthing facility that’s closer to home,” shares Gary. “Bringing this new line of services to South County is good for the community and good for Hoag.”

Donor support from Gary and others will be used to build the 34,000 sq. ft. facility with 12 private birthing suites which will include amenities to make moms-to-be and their families more comfortable. Women will labor, deliver and recover in the same room with a family-centered design and warm home-like aesthetic. Other named spaces in the Fudge Family Birthing Suites include the Tsao Family Lobby & Garden and the Hardtke Family Nursery.

## EVENTS

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# Physician Campaign Leadership Group 6<sup>TH</sup> ANNUAL CELEBRATION DINNER

Hoag Hospital Foundation hosted the 6th Annual Physician Campaign Leadership Group (PCLG) Celebration Dinner at the Newport Beach Country Club in June 2019. Flynn A. Andrizzi, PhD, president of Hoag Hospital Foundation, thanked Hoag physicians for their care and compassion which has inspired more than \$10 million in gifts to the Hoag Promise Campaign from grateful patients. He also recognized that Hoag physicians themselves have given \$3.7 million to the Campaign.

The program was led by PCLG co-chairs Michael Brant-Zawadzki, MD, FACR, Ron & Sandi Simon Executive Medical Director Endowed Chair, Pickup Family Neurosciences Institute, Hoag senior physician executive; Allyson Brooks, MD, Ginny Ueberroth Executive Medical Director Endowed Chair, Women's Health Institute and quality, safety & Improvement; and Kris V. Iyer, MD, FACP, FACE, senior vice president and chief administrative officer of HMTS.

### **2019 Hoag Promise Physician Partnership Award Honorees**

This year, Dr. Iyer presented the Hoag Promise Campaign Lifetime Achievement Award to Jeb Brown, MD, co-medical director of Minimally Invasive Surgery and Complex Gynecology and director of the Lora Family Robotics Surgical Center. Dr. Brown personifies the Hoag spirit and mission of taking excellent care of patients, working well with colleagues and conducting himself with integrity and dedication.

The Hoag Promise Physician Partnership Awards were awarded to January Lopez, MD, director of Breast Imaging at Hoag Breast Centers, and Rob Louis, MD, Empower360 Endowed Chair in Skull Base and Minimally Invasive Neurosurgery and program director of the Skull Base and Pituitary Tumor Program at the Pickup Family Neurosciences Institute.

### **Working Magic to Keep Me Alive**

A very special segment of the program featured a conversation, moderated by Dr. Brooks, between grateful patient Rick Sherman and Daryl Pearlstein, MD, director of the Lung Cancer Program at Hoag Family Cancer Institute.

*"I started giving to Hoag because of the incredible physicians who saved my life more than once," said Rick, who serves on the Hoag Family Cancer Institute Campaign Advisory Committee. "They gave me more time to spend with my children, which is priceless to me."*



## EVENTS

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# OC's Favorite Foodie Fest

## 2019 Hoag Summer Fest

The 2019 Hoag Summer Fest, hosted by the Hoag Hospital Foundation and 552 Club, was once again a sold-out celebration with tastings from some of our area's finest eateries, old-fashioned backyard games and live dance music. This highly anticipated summer tradition raised more than \$225K to support employee scholarships at Hoag with help from this year's event Chairs, community leaders Cheryl and Mark Hardtke.

"We offer our heartfelt thanks to Cheryl and Mark Hardtke for supporting this important event in their roles as the Chairs," said Flynn A. Andrizzi, PhD, president, Hoag Hospital Foundation. "We are also extremely grateful to all of our food and beverage partners, event underwriters and volunteers – thanks to them, this event continues to provide a wonderful experience for our guests, year after year, while raising funds for Hoag."

### Valued Partners

Hoag Summer Fest restaurant partners, many of whom have been loyal participants for decades, are vital to the overall success of this popular event. We extend our deep appreciation to this year's participating restaurants for donating their time, talent, food and raffle prizes to the 2019 Hoag Summer Fest:

A Restaurant  
Andrei's Conscious Cuisine  
& Cocktails  
Back Bay Bistro  
Bayside Restaurant  
Bear Flag Fish Co.  
Bluewater Grill  
Burger Boss  
CdM Restaurant  
CHAAK Kitchen  
Coastal Catering  
Don Francisco's Coffee  
El Cholo Corona del Mar  
Fig & Olive

Fresh Brothers  
Gabbi's Mexican Kitchen  
Greenleaf Chopshop  
Hi-Time Wine Cellars  
Hoag Hospital Mary & Dick Allen  
Diabetes Center Mobile Kitchen  
Ho Sum Bistro  
LAVA Craft Cocktail Co.  
Louie's by the Bay  
Maggiano's at South Coast Plaza  
Mayor's Table  
Muldoon's Irish Pub  
Newport Beach Fire Fighters  
Newport Rib Company

Nothing Bundt Cakes of  
Costa Mesa  
Olea Restaurant & Bar  
Rusty Pelican  
Sabatino's  
Santa Monica Seafood  
Straub Distributing Company  
The Bungalow Restaurant  
The Cannery Seafood of the Pacific  
Toast Kitchen & Bakery  
Turnip Rose Catering  
W Cafe & Restaurant  
Zotovitch Vineyards & Winery

The crowd danced to the Motown sounds of Chez'z Best Band. The grand prize raffle was a one-year lease of a new 2019 BMW 330i courtesy of Sterling BMW of Newport Beach.

We greatly appreciate our underwriters for their generosity and support of the 2019 Hoag Summer Fest.



— 2019 HOAG —  
**SUMMER FEST**



## EVENTS

### ***Choose Nursing, Choose Hoag 2019 Luncheon***

#### **Celebrating a Hoag Nursing Milestone Achievement**

Hoag Hospital Foundation's annual *Choose Nursing, Choose Hoag* luncheon was held in November 2019 at the Balboa Bay Resort. More than 200 donors, nurses and physicians, along with academic and corporate partners, gathered to honor Hoag nurses and the donors who support them in achieving their educational goals.

Longtime Hoag donor Louise Brigham was honored as the 2019 *Choose Nursing, Choose Hoag* Hall of Fame Honoree. "Today we have the pleasure of honoring Louise Brigham for her generous commitment to ensuring we have the best and brightest nurses," said Flynn A. Andrizzi, PhD, Hoag Hospital Foundation president. "Louise, with her husband, Dan, began supporting Hoag more than 40 years ago. We are grateful to her and her family for their decades of support."

Attendees enjoyed a panel discussion with three Hoag nurse scholarship recipients moderated by Marcy Brown, Hoag Senior Vice President and Chief Hospital Operations Officer. The panelists, who shared the impact of their scholarships, included Jada Alston, RN, MSN, Nursing House Supervisor, Hoag; Crystal Watson, MSN, RN, SCRNP, Clinical Nurse IV Float Pool, Hoag; and Rita Weise, MSN, ACNPC-AG, Acute Care Nurse Practitioner, Elaine & Robert Matranga Aortic Center at Hoag.

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*"At Hoag, you're surrounded by excellence, and excellence is contagious. Education is allowing us to achieve."*

**~Rita Weise, MSN, ACNPC-AG**

Acute Care Nurse Practitioner, Elaine & Robert Matranga Aortic Center at Hoag

#### **Nursing Education Milestone**

Thanks to donors who gave more than \$31.6 million to the Hoag Promise Campaign in support of Hoag nursing, 80 percent of Hoag nurses hold a bachelor's degree or higher.

"Thanks to philanthropy, Hoag is one of only ten Magnet® hospitals in the state of California," said Rick Martin, EdD, MSN, RN, Hoag senior vice president of Clinical Operations and chief nursing officer. "Starting in 2020, 80 percent of nurses with an advanced degree is a minimum to maintain Magnet® status. We are grateful to our donors for getting us there. Now, we need to maintain that and grow as our nursing staff expands to accommodate our future growth."

For more information about supporting Hoag Nursing, please contact Angelina Morano at (949) 764-7221 or [Angelina.Morano@hoag.org](mailto:Angelina.Morano@hoag.org).

HOAG  
PROMISE

Choose Nursing  
CHOOSE HOAG

hoag  
Hospital  
Foundation

HOAG  
PROMISE



## EVENTS

# A Holly Jolly Christmas Carol Ball

Hoag donors, volunteers and friends gathered at the Monarch Beach Resort to celebrate the 53rd Annual Christmas Carol Ball on Saturday, December 14, 2019. The merry making also had a higher purpose and proceeds of \$1,360,000.

Robert and Kitty Brunswick, chairs of this year's gala, greeted and thanked the more than 550 guests in attendance. "Kitty and I want to thank you for being here tonight and for your continued support of Hoag. Each of you play an important part in the success of the Hoag Promise Campaign, and we thank you for helping to bring world-class care to our community."

"Robert and Kitty are generous friends of Hoag," said Flynn A. Andrizzi, PhD, president, Hoag Hospital Foundation. "The energy and enthusiasm they brought as chairs of this year's ball was

infectious. They were joined by a group of underwriters embodying the spirit of giving that has symbolized the Christmas Carol Ball for five decades and counting."

Hoag Director of Pastoral Care Reverend Don Oliver, PhD, led the blessing over a beautiful dinner prepared by Executive Chef Collin Thornton. The crowd enjoyed a live performance by the energetic band NRG and danced the night away, many taking home fabulous silent auction items donated by friends of Hoag.

To view photos from this year's Christmas Carol Ball of the fun and memorable evening, please visit: [HoagPromise.org/CCBPhotos](http://HoagPromise.org/CCBPhotos).



53rd Annual

Christmas  
CAROL BALL



## GIFT PLANNING

If Your Goal Is To:	Ask Us About:	And Consider This:
<ul style="list-style-type: none"> <li>Keep control of your assets throughout your life</li> <li>Avoid estate taxation</li> <li>Leave a philanthropic legacy</li> </ul>	Bequest	You can create a bequest through your will or trust stating a specific amount or percent of your estate or by changing the beneficiary on a life insurance policy, annuity or retirement account.
<ul style="list-style-type: none"> <li>Exchange low yielding assets for a fixed lifetime income that is partially tax exempt</li> <li>Generate a current income tax deduction</li> </ul>	Charitable Gift Annuity	Income can begin immediately or be deferred to a later date when payments received are larger.
<ul style="list-style-type: none"> <li>Retain the right to live in your residence for life</li> <li>Use the equity in your home to generate additional retirement income</li> </ul>	Life Estate Agreement Plus Charitable Gift Annuity	If your situation changes, you can rent the property to others OR exchange your life estate for cash or annuity income.
<ul style="list-style-type: none"> <li>Receive lifetime income with potential for growth</li> <li>Avoid capital gains tax at sale of appreciated asset: real estate, stocks and mutual funds</li> <li>Generate a current income tax deduction</li> </ul>	Charitable Remainder Unitrust	Year-to-year income varies with trust performance. Flexible design allows full income distributions immediately or minimum distributions at the start and increased cash flow at a future date.
<ul style="list-style-type: none"> <li>Assure your philanthropic legacy lives forever</li> <li>Fund long-term programs, carrying family name and/or causes through the generations</li> </ul>	Endowment Gift	An endowment can be funded outright or by a multi-year pledge, bequest or designated remainder from either a trust (CRT) or annuity (CGA).
<ul style="list-style-type: none"> <li>Transfer assets to children or grandchildren over time while heavily discounting gift or estate taxes</li> <li>Provide annual support to a charity for a term of years</li> </ul>	Charitable Lead Trust	This trust avoids “all the money at once” inheritance. Children/grandchildren receive lump sums deferred for specified terms (5 years, 10 years, etc.).
<ul style="list-style-type: none"> <li>Have a predictable, fixed income not subject to market fluctuations</li> <li>Avoid capital gains tax at sale</li> </ul>	Charitable Remainder Annuity Trust	Fixed income for life or set term of years (5, 10, 15 or 20) for short-term needs such as early retirement (first 10 years until Social Security/Pension starts) or college funding for heirs.
<ul style="list-style-type: none"> <li>Gift a life insurance policy which is no longer needed</li> <li>Maximize the size of your testamentary charitable legacy</li> </ul>	Gift of Life Insurance	You can gift either a paid-up insurance policy or make annual gifts to Hoag to fund the ongoing premiums.
<ul style="list-style-type: none"> <li>Avoid double taxation (income and estate tax) on your IRA balance at death</li> <li>Fund a charitable bequest</li> </ul>	Gift of IRA	Hoag can be a full or part beneficiary of your IRA account. Pending legislation may make lifetime transfers work.
<ul style="list-style-type: none"> <li>Avoid capital gains tax on a sale of stock, mutual funds or real estate</li> <li>Generate tax deduction for full market value</li> <li>See your philanthropy at work</li> </ul>	Outright Gift of an Appreciated Asset	Asset must be held long-term (one year plus one day).
<ul style="list-style-type: none"> <li>Sell appreciated real estate for both cash and income</li> <li>Generate a tax deduction to offset initial gain on cash portion</li> <li>Defer taxation on balance using installment sale treatment</li> </ul>	Installment Bargain Sale	This technique may be the best for indebted real estate.

**For more information**, please contact Julie Heggeness at (949) 764-7206 or [Julie.Heggeness@hoag.org](mailto:Julie.Heggeness@hoag.org)

## Ilona Martin

# 20 Years of Giving Back

In her art studio, impressionist painter, philanthropist and Hoag volunteer leader Ilona Martin paints many of Newport Beach's most iconic locations. Born in East Germany, Ilona appreciates the wonderful life she's built for herself and her family. She shows her love of her community through her art and her work as a passionate Hoag advocate and friend.

"Hoag saved my life from ovarian cancer and was the place where my grandson was born," she said. "I've been so fortunate in my life that it feels natural giving back to the hospital that has given so much to me and my family."

### Part of the Family

For many years, Ilona has worked tirelessly behind the scenes serving on Hoag's *Choose Nursing, Choose Hoag* committee as well as recruiting restaurants and underwriters for Hoag Summer Fest. During her tenure as president of the 552 Club, she established the annual 552 Club Presidents' Circle breakfast. She made a charitable bequest to nursing scholarships to ensure the advancement of Hoag nurses. The rewards of Ilona's generosity are the close relationships she shares with her fellow donors as well as Hoag clinicians, leaders and staff.

"When you give to Hoag, whether through a financial commitment or service, you are part of a big family that cares about each other and their neighbors," she said.

Ilona has invited countless community members and grateful patients to become a meaningful part of the Hoag family, including best-selling author Dean Koontz. "It meant so much to me when Dean Koontz spoke at the Hoag Heritage Society," she said. "He shared many personal stories because he called us family. Inviting people in is at the heart of what I do."

### A Life of Service

Ilona began her volunteer leadership with Hoag in 1999 by donating hats to cancer patients from her manufacturing company. She noticed an unused balcony space at the Hoag Family Cancer Institute and decided to create a meditation garden. With the help of her adult children, she planted trees and flowers and

brought in seating for patients, families and clinicians. Shortly thereafter, one of her employees was diagnosed with breast cancer. Ilona contacted Hoag, and her employee received immediate care that saved her life.

"Thanks to Hoag, my employee and friend was able to meet her first grandchild," she said. "I'll never forget how everyone I spoke to was willing to help."

Ilona has also served on the Hoag Hospital Foundation and Hoag Hospital boards of directors and was president of the 552 Club from 2010-2012. She chaired the Hoag Summer Fest in 2010 and helped to organize past Christmas Carol Ball galas. In 2009, she received the Vin Jorgensen Award in appreciation for her many years of dedication and service.

When not volunteering for Hoag, the Laguna Playhouse or Laguna College of Art + Design, Ilona organizes a monthly art walk in the Cannery Village and travels annually to Hungary to visit her sisters. Ilona hopes that her charitable bequest inspires current and future generations of donors to make a lasting impact on Hoag.

For more information on how you can support Hoag through your estate, please contact Julie Heggeness, JD, CSPG, TEP, at (949) 764-7206 or Julie.Heggeness@hoag.org.



## MESSAGE FROM THE PRESIDENT

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**Flynn A. Andrizzi, PhD**  
*President, Hoag Hospital Foundation*



I still pause when I think about surpassing our \$627 million Hoag Promise Campaign goal 18 months ahead of schedule. The fact that we've not only exceeded our goal but continue to break Hoag fundraising records is a testament to the commitment of our donors and volunteers.

Because of you, Hoag leaders are able to bring treatments, programs and technology to our community that are normally found only in large academic medical centers. But, we still have work to do. Many of the Hoag Promise Campaign clinical area goals remain to be met and, hopefully, exceeded.

### **Giving with Meaning and Purpose**

I can tell you from the bottom of my heart that philanthropy is powerful and personal. During the tenth anniversary celebration of the Mary & Dick Allen Diabetes Center (page 3), grateful patient Lindsay Lawrence shared her journey with type 1 diabetes. She was one of the Allen

Diabetes Center's first patients, and she found a community of young people enduring struggles she shared. She lived with the real fear that she would never be able to have a family of her own. But, thanks to The Ueberroth Program for Women with Diabetes and Sweet Success, Lindsay is the proud mom of two.

Dean Koontz is one of our longtime friends who has shared his personal story with us many times. He and his wife Gerda made an extraordinary gift of \$9M to transform cancer care in Orange County (page 5). I'd like to share a memory with you. While regaling us with his and Gerda's many adventures, Dean paused during his speech at the 24th annual Heritage Society Luncheon and said something rather extraordinary. He called us, Hoag, part of his family. That has stayed with me ever since and makes his and Gerda's generosity even more touching.

We were delighted to award three new Endowed Chairs at the 2019 investiture ceremony (page 7),

celebrating the physician chair holders and donor families, Tom and Marianne Larkin and Eric and Sheila Samson. Our Endowed Chair Program has captured the imagination of so many of our donors and philanthropic families. In many cases, they are moved to honor a physician they respect. Others appreciate the opportunity of creating a lasting legacy that demonstrates their gratitude for care that they or loved ones received at Hoag. In all cases, they know and understand just how meaningful and impactful endowed chairs are to Hoag.

Our donor community is truly extraordinary. To each and every one of the 22,600-plus donors who've contributed to the Hoag Promise Campaign to date, I say thank you on behalf of people like Lindsay who, with your support, made a dream come true. They are the reason we do this work, and we will push forward to care for one another.

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